

ACCOMPLISHMENTS for FY 1989-1990
Submitted to the Board of Directors
June 19, 1990
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Executive Director

INTRODUCTION

This report is written on the basis of the three year plan approved by ASPIRA's Board of Directors at their annual retreat in July 1989. Thus I will respond to how I have achieved these goals and objectives during the fiscal year.

SUMMARY

I began the 1989-1990 fiscal year with the sense that I had a tremendous challenge ahead. The Agency had lost \$100,000 from the state, this meant that the centers in Trenton and Camden would each be reduced by \$50,000. Anticipating a deficit I was very conservative. As a result, I was able to save approximately the same amount of money in the general operating budget.

The Trenton Center functioned with a budget of about \$48,000. Under these difficult economic circumstances this center was successful in implementing a full program with all services--at a minimum cost to the general operating budget.

Although the center in Camden lost \$50,000, other funding was maintained. Services were maintained also. The Paterson and Newark centers maintained the level of funding. Due to changes in both the Newark Block Grant and the Math and Science Program two additional schools were serviced.

In programs, my goal for this year was to maintain the number of students in the caseload and to improve on quality of service. Thus this year there are 1,563 students in the caseload attending 17 schools in five counties. (Last year the caseload was 1,542 students.) The quality of service increased through more effective planning and a more comprehensive approach to service.

I began the fiscal year knowing that the fiscal office was behind schedule in producing reports while I also wanted it to become updated with the use of computers. Both were accomplished successfully.

The computerization of the three main offices, i.e., development, fiscal and programs, is the most important accomplishment for me. It has made the lives of employees more manageable and it has helped all offices in accomplishing their goals and objectives in a more effective and timely manner. Although we still have a long way to go, we have taken a giant step this past year.

1. DEVELOPMENT PROGRAM

Reorganization

The Development Office was reorganized to systematize procedures and to improve its efficiency. The office is now seen as having eight areas of activity:

- a. Foundations and Corporations
- b. Government grants and contracts
- c. United Way
- d. Special Events
- e. Direct Mail Solicitation
- f. Capital Campaign
- g. Publications
- h. Strategic planning and evaluation

Areas a, b, c, and h are the responsibility of Ms. Blanca Facundo, Director of Development and areas d, e, f and g are the responsibility of Ms. Denise Byrne.

I instructed Blanca Facundo to up-date the work of the office and to create a timeline which would allow for more effective planning and goal setting.

This required reading through all the foundation and corporate files, identifying their status ("dead", "to be nurtured", "active"), and determining follow-up.

At the same time I began to assess the various software packages available in the market which could be used to update the office and monitor the data. The next step is to purchase a software program entitled Gift Consultant. This program is easy to use, will monitor individual giving and capital campaign fundraising.

Publications

ASPIRA's publications have been ready for a change for the last couple of years. We are now in the process of preparing brochures which will be in tune with the work we do.

I began this process by giving this responsibility to Denise Byrne. El Clarin, previously contracted with The Writing Company, is now edited by Denise Byrne with input from all staff. Carreras will now to do all our printing. It cost less money to produce this issue of El Clarin while it has better appearance and is more informative.

Our new newsletter has been received very well. As an example, Ms. Lydia Garrett from the Victoria Foundation called to let me know how impressed she was with the quality of the newsletter.

Next, we have separated membership giving from the newsletter. The newsletter will now be an informative document and therefore a marketing tool. Annual Membership will now fall under the Direct Mail Campaign. A direct mail campaign is scheduled for Fall 1990. I anticipate an increase in funds raised through this approach compared to the membership approach.

This approach is one that has led us to renew our bulk mail permit. This year's Spring issue of El Clarin was mailed by bulk, bringing about a savings of \$375.

Alumni Association

The Alumni Association was given as an assignment to an intern I was able to obtain from the Department of Community Affairs. Wendy, an Alumni herself worked on this project with a great deal of enthusiasm.

Finally, the Alumni Association began having a couple of meetings. AALAS has been slow at getting started, but we do have a chairperson, Ms. Carmen Solis. AALAS is planning to have a picnic this summer.

2. MANAGEMENT SUPPORT

Budget Preparation

When I began my tenure with ASPIRA I was surprised to find that although the fiscal year had begun, there was no budget to work with. This fiscal year, I began the budget process with a great deal of anticipation. In addition, being a firm believer in the use of computers I worked all year at computerizing the fiscal office to make it more effective at producing reports in a more timely fashion.

The budget for FY 91 has been prepared successfully with the use of the computer. In addition, we will now be able to get combined expenditure reports which will assist in more effective planning.

Finally ASPIRA of New Jersey has a budget approved before the new fiscal year begins!

Reports

When Carmen Sanchez began with us during the FY 89, the office was behind schedule in many areas. Besides catching-up, we moved forward in the computerization of the office. Financial statements are now up-to-date on a monthly basis.

There is now a combined general journal entries system whereby all monthly operations are recorded and posted to the general ledger with only one entry.

There is a great improvement in the income operations. All the income for the month is classified and filed in the appropriate source folder. These accounts are balanced/audited every month.

Now our reports are computerized in a manner that management can see the combined budget and expenses. This means that we know exactly how much revenue the Agency has in each program as well as knowing combined balances.

General Operating

As mentioned in the summary, general operating costs were monitored constantly and spent judiciously. This led to a savings of over \$100,000.

The general operating budget approved in July 1989 was for \$317,789. We will have spent approximately \$190,447 by June 1990. This gives us a savings of \$127,342. Note that this savings has taken place although we have had an increase in expenses in rent, utilities, and taxes.

I accomplished these savings by first instructing the fiscal officer and the bookkeeper to not use general operating funds unless absolutely necessary. Secondly, I instructed Roberto to have major program activities in collaboration with institutions willing to contribute toward expenses for these activities. Thirdly, when possible I included expenses in grants.

Example: Aspira Public Policy Program -- I increased student travel significantly so that it would pay for those activities not covered by other grants.

Finally, I monitored each expense and balance in every category on a monthly basis.

Income and Expenses

The income for this fiscal year increased by \$52,978, most of which is reflected in programs. This is an increase of 6% over last year. On the expenses side, the increase will have been \$15,969 or 2%. The following chart compares FY 1989 and FY 1990 in relation to income and expenses.

	1989	1990
INCOME		
Programs	\$571,768	\$629,301
General Operating	209,083	204,528
TOTAL	\$780,851	\$833,829
EXPENSES		
Programs	\$574,281	\$557,543
General Operating	139,307	190,447
Fixed Assets	18,433	
TOTAL	\$732,021	\$747,990
NET RESULTS	\$ 48,830	\$ 85,839

Health Care Benefits

During the last couple of years, Health Care costs have increased significantly. When I began with ASPIRA I noticed that that grants did not pay fringe benefits at the level these had risen. The General Operating budget was paying a substantial amount, in some cases up to 14% of the total cost. The second problem was that although these rates had risen to 23%, the approved budget reflected a lower rate.

After comparing various plans, I recommended that a change be made from Blue Cross & Blue Shield to US Helathcare. This change led to a savings of over \$4,000. If an analysis is made of the increases Blue Cross & Blue Shield has had since we made a change, I am certain that the savings would be higher. Another benefit has been the high level of satisfaction employees have with the plan.

3. LEADERSHIP AND EDUCATION DEVELOPMENT PROGRAMS

Program Implementation

The heart of ASPIRA lies in its programs. This year my focus was on the quality of service to students. This was accomplished beyond my expectations.

I began this process by scheduling two weeks of extensive training, planned after getting feedback from staff regarding areas of need. During these two weeks, all professional staff was involved in preparing a timeline and a workplan. The mission of the Agency and the goals, and objectives for the year were clearly outlined.

Evaluations indicate that staff development appropriately responded to the needs identified by staff, that the content was very good, and that the speakers were excellent.

An analysis of evaluations completed by students suggests that they were very satisfied with the major activities. I certainly was impressed with those I attended. As an example, the Health Careers Conference had Dr. Montalvo as keynote speaker. She very appropriately addressed the student participants and allowed time for students to ask questions. Students felt that she responded to their questions and concerns. I certainly was impressed with the attendance of students and school personnel.

Evaluation Procedures

When I began my tenure, I was concerned that evaluations were not being conducted in an effective manner. Although ASPIRA had an evaluation instrument, it was not being used correctly. Supervisors were filling in numbers not knowing what they were doing. It turns out that this instrument when used correctly can be very useful.

During this year we improved evaluation procedures to more effectively reflect employees' workplan and areas of evaluation. Evaluations now identify a rating level for each area of responsibility. Each area is rated according to how the employee accomplishes his/her goals and objectives as per his/her work plan.

How it works: Each employee prepares a workplan identifying areas of responsibility. These categories include, recruitment goals, workshops, counseling, coordination of conferences, and other. When evaluated correctly, an employee can get a rating from 0% to 100%

in each category. For example, if a counselor is supposed to conduct 10 workshops, but only conducts 5 he will get 50% in that category. If he recruits all the students required, then he will get 100% in that category. When all categories are added an average is the final "grade". The employee can get feedback on his evaluation based on strengths and weaknesses. This rating allows for employees to identify areas that need to be improved.

More effective data base management
and use of data.

During staff development I made it clear to staff that the use of computers would be required by all. Secondly, I then included two days of training in computers.

As a result, data collection has continued to improve significantly. Each center has continue to work on the analysis of students serviced by income, ethnic background and sex. For example, in our current caseload, there are 592 males compared to 971 females. Sixty two percent (62%) of the students in our caseload are Puerto Rican. This is less than last year when 64% of our students were Puerto Rican.

Maintained level of service in
Trenton and Camden although funding
level was reduced by \$100,000.

We continued to provide services to both Trenton High School and Junior High School #2. This year a total of 190 students are in the caseload. These students have participated in all our major activities.

I accomplished this by moving the ASPIRA office to a board of education building where we would not pay rent. This was a savings of \$6,000. Secondly, I combined Trenton and Camden activities so that the Camden budget could pick-up some expenses such as student travel. All orders for educational materials and office supplies were processed through the Executive Office so that other budgets could cover these expenses.

GOALS FOR 1990-1991

1. To continue my development in the areas of fundraising.

On June 22nd I will be attending the 11th Annual Conference "Fund Raising Day in New York".

On November 2nd I will attend the New Jersey Conference on Philanthropy.

2. To focus more on the capital campaign in relation to fundraising and supervision of activities.

I have already purchased a book entitled "Conducting A Successful Capital Campaign: A Comprehensive Fundraising Guide for Nonprofit Organizations". In addition, I will be attending workshops addressing capital campaign issues.

Secondly, Denise Byrne has already been assigned to the capital campaign. She will now make this responsibility one of her priorities. Thirdly, as we proceed with the capital campaign, I will take the lead in the identification of funding sources, coordination of fund raising efforts and follow-up.

3. To facilitate the development of Roberto Del Rios so that he can represent ASPIRA in functions and activities.

I already met with Roberto to clarify the mutual commitment necessary for this goal to be achieved. Roberto has made a two year commitment to ASPIRA. In turn, he will be provided the opportunity to continue his development. Of particular concern is training so that he can make effective presentations. This training will take place as soon as possible.

4. To maintain the level of funding at all sites.

The 1990-1991 fiscal year will be exiting for the Development Office. With the implementation of the software package, Gifts Consultant, I will be able to monitor the work of the office effectively.

Secondly, a strategic planning session will be held with Denise Byrne, Blance Facundo, and the Development Committee so that more effective planning can take place.

Thirdly, the timeline which has been prepared will keep me up-to-date at all times.

5. To submit a grant application to Special Services for two programs: Talent Search and Special Services (College Counseling).

I already went to Washington to initiate this process. Several components of this proposal have already been started.

Secondly, the project being implemented with Rutgers, Newark will greatly enhance the Special Services Grant. (This year an effort has been made to admit more Puerto Rican students to Rutgers, Newark. During the summer, I will be working very closely with the EOF office to make sure that these students receive all the support services necessary. In addition, ASPIRA staff will be conducting group sessions with these students.)

6. To increase my level of participation in "public relations" activities so that ASPIRA continues to be recognized in the area of education.

I believe that ASPIRA's role as an advocate in the area of education is lacking. In collaboration with the ASPIRA Board an issue should be identified for ASPIRA to either take the lead and/or to publicly take a stand. For example, the Abbot vs. Burke case is one that is critical for ASPIRA to actively get involved. The first step is an article in our newsletter which takes a clear position on the issue. The second can be a press release being critical on the level of funding for education.

These issues and/or positions need to take place in collaboration with the Board of Directors. ASPIRA and the Board need to be in public arena more often, particularly in relation to educational issues.

This past year, my time has been primarily consumed with the inner workings of the Agency. As the various components begin to "fall in place" I can then devote more time to issues and/or concerns taking place within the state.

7. To strengthen the development office by purchasing a software program to more effectively monitor the work of that office so that fundraising level can increase.

The decision to purchase the software package "Gifts Consultants" has already been made. The implementation will begin in the summer. Denise Byrne will have this responsibility. A secretary will be assigned to input the data.

8. To continue to work closely with the Board of Directors.

I will keep board members more informed on the workings of the Agency, particularly the fundraising aspects, so that we proceed with the same basic information. I will do this by having Denise Byrne and Blanca Facundo make presentations to the Board of Directors on a regular basis. The Development Committee and development staff will hold regular strategic meetings. A timeline will be given to the board members so that they are aware of what the Executive Office is doing on a day-to-day basis.

Board member will be invited and encouraged to attend program activities.

I will meet with board members individually so that we can mutually exchange issues and/or concerns.